

WHAT IS CLAIMED IS:

- 1 1. A method of facilitating access to documents, comprising:
2 assigning a first document tag to a document; and
3 automatically determining an associated tag for the document based on the first
4 document tag.
- 1 2. The method of claim 1, wherein the document comprises content to be
2 provided to a content reader via a communication network.
- 1 3. The method of claim 2, wherein the content comprises at least one of: (i) text
2 information, (ii) image information, (iii) audio information, and (iv) executable
3 information.
- 1 4. The method of claim 2, wherein the communication network comprises at least
2 one of: (i) the Internet, (ii) an intranet, (iii) a public network, (iv) a public switched
3 telephone network, (v) a proprietary network, (v) a wireless network, and (vi) a local area
4 network.
- 1 5. The method of claim 2, wherein the content comprises at least one of: (i)
2 financial information, (ii) financial news, (iii) information about financial events, (iv)
3 investment information, and (v) market information.
- 1 6. The method of claim 1, wherein at least one tag is associated with at least one
2 tag domain.

1 7. The method of claim 6, wherein at least one tag domain comprises a single-
2 rooted, hierarchical data structure.

1 8. The method of claim 6, wherein at least one tag domain comprises a multi-
2 level domain, and at least one domain level comprises a plurality of tags.

1 9. The method of claim 1, wherein at least one tag is associated with at least one
2 of: (i) an author, (ii) a date, and (iii) an information type.

1 10. The method of claim 1, wherein at least one tag is associated with at least one
2 of: (i) a sector, (ii) an industry, (iii) a research type, (iv) a company, (v) an issuer, (vi) a
3 region, (vii) a country, (viii) an investment product, (ix) a security instrument, (x) a third-
4 party rating, (xi) a research analyst, (xii) a strategist, (xiii) an event type, (xiv) a subject,
5 (xv) an investment style, (xvi) a market cap, (xvii) a document type, (xviii) an
6 information value, and (xix) a currency.

1 11. The method of claim 1, wherein said assigning is manually performed by at
2 least one of: (i) a content publisher, and (ii) a tag assignor.

1 12. The method of claim 1, wherein the document comprises content to be
2 provided to a content reader, and said assigning is automatically performed based on the
3 content.

1 13. The method of claim 1, wherein the first document tag comprises at least one
2 of: (i) a primary tag, and (ii) a secondary tag.

1 14. The method of claim 1, wherein a plurality of document tags are assigned to
2 the document.

1 15. The method of claim 1, wherein said determining comprises:
2 determining the associated tag in accordance with a pre-determined tag
3 association.

1 16. The method of claim 15, wherein the pre-determined tag association is
2 associated with at least one of: (i) a start date, (ii) an end date, (iii) antecedent tags, (iv)
3 descendant tags, and (v) sibling tags.

1 17. The method of claim 15, further comprising:
2 automatically generating the pre-determined tag association.

1 18. The method of claim 1, further comprising:
2 assigning a second document tag to the document based on the associated tag.

1 19. The method of claim 1, wherein said assigning of the second document tag
2 comprises:
3 transmitting an indication of the associated tag to a content publisher;
4 receiving an indication from the content publisher; and
5 assigning a second document tag to the document based on the associated tag and
6 the received indication.

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1 20. The method of claim 1, further comprising:
2 receiving the document from a content publisher.

1 21. The method of claim 20, wherein documents are received from a plurality of
2 content publishers.

1 22. The method of claim 1, further comprising:
2 retrieving the document in accordance with at least one of: (i) the first document
3 tag, and (ii) a second document tag.

1 23. The method of claim 22, wherein the document is retrieved further in
2 accordance with at least one of: (i) a reader tag, (ii) a request tag, and (iii) an entitlement
3 tag.

1 24. The method of claim 22, further comprising:
2 transmitting the retrieved document to a content reader via a communication
3 network.

1 25. The method of claim 24, wherein said transmitting is performed via at least
2 one of: (i) a content controller, (ii) a content reader, (iii) a personal computer, (iv) a
3 server, (v) a portable computing device, (vi) a telephone, (vii) a Web site, and (viii) an
4 electronic mail message.

SUB A17 26. A computer-implemented method of facilitating access to investment
2 research documents, comprising:
3 receiving an investment research document from a content publisher;

4 receiving an indication of a first document tag from the content publisher,
5 wherein the first document tag is associated with a single-rooted, hierarchical data
6 structure;
7 automatically determining an associated tag for the document based on the first
8 document tag;
9 transmitting an indication of the associated tag to the content publisher;
10 receiving an indication from the content publisher;
11 assigning a second document tag to the investment research document based on
12 the associated tag and the received indication;
13 retrieving the investment research document in accordance with the second
14 document tag and at least one of: (i) a reader tag, (ii) a request tag, and (iii) an entitlement
15 tag; and
16 transmitting the retrieved investment research document to a content reader via a
17 communication network.

1 27. An apparatus, comprising:
2 a processor; and
3 a storage device in communication with said processor and storing instructions
4 adapted to be executed by said processor to:
5 assign a first document tag to a document, and
6 automatically determine an associated tag for the document based on the
7 first document tag;

1 28. The apparatus of claim 27, wherein said storage device further stores at least
2 one of: (i) a tag database, (ii) a document database, and (iii) a tag association database.

1 29. The apparatus of claim 27, further comprising:
2 a communication device coupled to said processor and adapted to communicate
3 with at least one of: (i) a content publisher, (ii) a document storage device, (iii) a content
4 controller, (iv) a content reader, and (v) a payment service.

1 30. A medium storing instructions adapted to be executed by a processor to
2 perform a method of facilitating access to documents, said method comprising:
3 assigning a first document tag to a document; and
4 automatically determining an associated tag for the document based on the first
5 document tag.

1 31. A method of facilitating access to documents, comprising:
2 creating a document;
3 transmitting the document to a content controller along with an indication of a
4 first document tag;
5 receiving an associated tag from the content controller; and
6 transmitting to the content controller an indication of whether or not a second
7 document tag should be assigned to the document based on the associated tag.

1 32. A method of facilitating access to documents, comprising:
2 receiving a pre-determined tag association;
3 retrieving a first document tag for a document; and
4 determining an associated tag for the document based on the pre-determined tag
5 association and the first document tag.

1 33. The method of claim 32, wherein said retrieving and determining are
2 performed for a plurality of legacy documents.

1 34. The method of claim 32, wherein said retrieving the first document tag is
2 further associated with at least one of: (i) tag translation, and (ii) content evaluation.

1 35. The method of claim 32, wherein the received pre-determined tag association
2 comprises an adjusted tag association.

1 36. A method of facilitating access to documents, comprising:
2 assigning a primary document tag to a document; and
3 assigning a secondary document tag to a document.

1 SUB A27 37. A method of facilitating access to documents, comprising:
2 assigning a first document tag to a document; and
3 automatically assigning a second document tag to the document based on the first
4 document tag.

ADD A37